COURSE OVERVIEW TM0400A
Records Management

Course Title
Records Management

Course Date/Venue
August 11-15, 2025/Glasshouse Meeting Room, Grand Millennium Al Wahda Hotel, Abu Dhabi, UAE

Course Reference
TM0400A

Course Duration/Credits
Five days/3.0 CEUs/30 PDHs

Course Description

This practical and highly-interactive course includes real-life case studies and exercises where participants will be engaged in a series of interactive small groups and class workshops.

Managing an ever-increasing volume of paper and electronic (digital) documents, records, knowledge and content can be very difficult. How do you best capture, manage and store the documents and records in your organization? How can records management ISO 15489 and information security ISO 27001 help? Does your approach meet compliance requirements, security, regulations and standards? What is the best way to manage emails, web pages and electronic documents and paper records? How do you find the right documents and records when you need them? How does workflow and business process management work with documents and records management to help increase efficiency within your company?

ISO 15489 is the international standard for records management. It is about attaining a records management benchmark of best practice, setting up methodology, processes and the resulting data storage and using an electronic records management system.

This course covers the strategies, tools, and technologies used to capture, categories, manage, store, preserve (archive), and deliver documents and records in support of business processes. This course also covers the core components of ISO 15489 so that organizations become compliant with best practices.

The course covers all the essential skills needed to understand, use and apply document and records management and all the essential skills needed to understand, use and apply ISO 15489 records management standard and ISO27001 information security. There will be discussions on the use of software, best practice implementation as well as applying all the key concepts. The course will concentrate on the skills required to effectively deploy and maximize the benefit of document and records management as well as manage the outcomes and deliver business benefits. All participants will return to their organizations with a detailed understanding and have developed action plans to implement document and records management successfully in their organizations.

Course Objectives

Upon the successful completion of this course, each participant will be able to: -

- Apply and gain an in-depth knowledge on documents and records management

- Discuss document and records management lifecycle including the ISO 15489 records management standard

- Review how to implement a records management system based on ISO 15489

- Help create business case and requirements for the selection and procurement of document and records management

- Create a document and records management plan of action to implement in their organization and learn from best practice implementations and case studies

- Recognize the concepts for managing information and content, such workflow, business process and collaboration

- Review industry leading solutions and vendors in this marketplace using metadata, business classification scheme, taxonomy and setting retention plans

- Identify the legislation, standards and regulation as well as set up search and retrieval including access controls and security

- Develop storage models, audit trail and storage technologies

Exclusive Smart Training Kit - H-STK®

*Participants of this course will receive the exclusive "Haward Smart Training Kit" (**H-STK®**). The **H-STK®** consists of a comprehensive set of technical content which includes **electronic version** of the course materials conveniently saved in a **Tablet PC**.*

Who Should Attend

This course provides an overview of all significant aspects and considerations of documents and records management for professionals and leaders who wish to learn more about document management strategies for improving organizational efficiency; personnel moving into leadership roles to embrace better controls for managing paper and electronic documents; information security professionals; document controllers and administrators; document and records management personnel; document management supervisors; suppliers, solution providers and vendors; executives; users of document and records management; personnel seeking to enhance their skills; IT management; and technical staff.

Course Certificate(s)

Internationally recognized certificates will be issued to all participants of the course who completed a minimum of 80% of the total tuition hours.

Certificate Accreditations

Haward's Certificates are accredited by the following international accreditation organizations: -

- British Accreditation Council (BAC)

  Haward Technology is accredited by the **British Accreditation Council** for **Independent Further and Higher Education** as an **International Centre**. Haward's certificates are internationally recognized and accredited by the British Accreditation Council (BAC). BAC is the British accrediting body responsible for setting standards within independent further and higher education sector in the UK and overseas. As a BAC-accredited international centre, Haward Technology meets all of the international higher education criteria and standards set by BAC.

- The International Accreditors for Continuing Education and Training (IACET - USA)

  Haward Technology is an Authorized Training Provider by the International Accreditors for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Herndon, VA 20171, USA. In obtaining this authority, Haward Technology has demonstrated that it complies with the **ANSI/IACET 2018-1 Standard** which is widely recognized as the standard of good practice internationally. As a result of our Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for its programs that qualify under the **ANSI/IACET 2018-1 Standard**.

  Haward Technology's courses meet the professional certification and continuing education requirements for participants seeking **Continuing Education Units** (CEUs) in accordance with the rules & regulations of the International Accreditors for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

  Haward Technology Middle East will award **3.0 CEUs** (Continuing Education Units) or **30 PDHs** (Professional Development Hours) for participants who completed the total tuition hours of this program. One CEU is equivalent to ten Professional Development Hours (PDHs) or ten contact hours of the participation in and completion of Haward Technology programs. A permanent record of a participant's involvement and awarding of CEU will be maintained by Haward Technology. Haward Technology will provide a copy of the participant's CEU and PDH Transcript of Records upon request.

Course Instructor(s)

This course will be conducted by the following instructor(s). However, we have the right to change the course instructor(s) prior to the course date and inform participants accordingly:

Mr. **Drag Zic** is a **Senior Management Consultant** with over **30 years** of training and industrial experience. His expertise lies extensively in the areas of **Leading Effective Meetings**, **Leadership & Business**, **Presentation** Skills, **Decision Making** Skills, **Communication** Skills, **Negotiation** Skills, **Coaching & Mentoring**, **Economics & Governance in Climate Change**, **Performance** Management, **Customer Service** Management, **Critical Thinking & Creativity**, **Quality** Management, **Risk** Management, **Data Management** Systems, **R&D** and **Research** Management, **Project** Management, **Planning**, **Budgeting & Cost Control**, **Document** Management, **Record** Management and **Contract** Management. Further, he is well-versed in Analytical & Chemical Laboratory Management, Statistical Analysis of Laboratory Data, Statistical Method Validation & Laboratory Auditing, Sample Development & Preparation in Analytical Laboratory, Data Analysis Techniques, Laboratory Quality Management (ISO 17025), Applied Research & Technology, Basic Geology, Quality Assurance Assessment, Quantified Risk Assessment (**QRA**) as well as in Seismic Monitoring Systems, Seismological Software (4di, Xmts, OptiNet and ErrMap), Data Analysis, Rock Mass Stability Analysis, Seismic Budget Planning & Productivity Improvement Analysis, HazMap, ISO Standards as well as Balance Scorecard. He is currently the **Director** & **Principal Consultant** of **DRAMI** wherein he is responsible in formulating and executing the plans for applied research and technology transfer.

During Mr. Zic's career life, he had occupied several significant positions as the Programme Manager**,** Managing Member**,** Rock Engineering Manager**,** Contract Manager**,** Consultant/Lecturer**,** Mine Seismologist**,** Data Analyst **and** Assistant Analyst **from different international companies.**

Mr. Zic is a **Professional Natural Scientist**, has a **Bachelor** degree in **Geology**, a **Diploma** in **Management Development Programme** and currently enrolled for **Phd** in **Wits University**. Further, he is a **Certified Instructor/Trainer**, a **Certified Trainer/Assessor** by the **Institute of Leadership & Management** (**ILM**) and an active member of various professional engineering bodies internationally like the European Geosciences Union (**EGU**), the Canadian Institute of Mining (**CIM**), the Project Management South Africa (**PSMA**), the European Association of Geoscientists and Engineers (**EAGE**), the South African Council for Natural Scientific Professions (**SACNASP**), the International Society for Rock Mechanics (**ISRM**) and the South African Geophysical Association (**SAGA**). He has further delivered numerous trainings, workshops, conferences and seminars internationally.

Training Methodology

All our Courses are including **Hands-on Practical Sessions** using equipment, State-of-the-Art Simulators, Drawings, Case Studies, Videos and Exercises. The courses include the following training methodologies as a percentage of the total tuition hours:-

30% Lectures
20% Practical Workshops & Work Presentations
30% Hands-on Practical Exercises & Case Studies
20% Simulators (Hardware & Software) & Videos

In an unlikely event, the course instructor may modify the above training methodology before or during the course for technical reasons.

Course Fee

US$ 5,500 per Delegate + **VAT**. This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

Accommodation

Accommodation is not included in the course fees. However, any accommodation required can be arranged at the time of booking.

Course Program

The following program is planned for this course. However, the course instructor(s) may modify this program before or during the course for technical reasons with no prior notice to participants. Nevertheless, the course objectives will always be met:

Day 1: **Monday, 11th of August 2025**

Time	Activity
0730 – 0800	*Registration & Coffee*
0800 – 0815	*Welcome & Introduction*
0815 – 0830	**PRE-TEST**
0830 – 0930	***Strategy & Understanding Key Elements of Documents & Records Management Compliance*** *Introduce Document & Records Management ● ISO 15489 Part 1 & Part 2 Overview*
0930 – 0945	*Break*
0945 – 1100	***Strategy & Understanding Key Elements of Documents & Records Management Compliance (cont'd)*** *Business Case & Drivers ● Business Requirements for Managing Document & Records*
1100 - 1230	***Strategy & Understanding Key Elements of Documents & Records Management Compliance (cont'd)*** *Managing Information as an Asset ● Understanding the Terminology*
1230 – 1245	*Break*
1245 – 1420	***Strategy & Understanding Key Elements of Documents & Records Management Compliance (cont'd)*** *Document & Records Management Strategies ● Information Governance*
1420 - 1430	***Recap***
1430	*Lunch & End of Day One*

Day 2:   **Tuesday, 12th of August 2025**

0730 – 0930	***Concepts & Set Up Components*** *Document & Records Lifecycle ● Capture & Storage Management ● Storage & Handling*
0930 – 0945	*Break*
0945 – 1100	***Concepts & Set Up Components (cont'd)*** *Preservation & Archiving ● Metadata & Indexing*
1100 – 1230	***Concepts & Set Up Components (cont'd)*** *Classification Schemes ● Searching & Retrieving*
1230 – 1245	*Break*
1245 – 1420	***Concepts & Set Up Components (cont'd)*** *Controls & Security ● Legislation, Standards & Regulation*
1420 - 1430	***Recap***
1430	*Lunch & End of Day Two*

Day 3:   **Wednesday, 13th of August 2025**

0730 – 0930	***Process & Delivery*** *Information Gathering: Audit & Survey ● Building a Business Case*
0930 – 0945	*Break*
0945 – 1100	***Process & Delivery (cont'd)*** *Business Requirements ● ISO 15489 Part 1 (How To Set ISO 15489 Policies & Standards, Assigning Responsibilities & Authorities, Establishing Procedures & Guidelines)*
1100 - 1230	***Process & Delivery (cont'd)*** *Business Classification Scheme ● IT Infrastructure Details*
1230 – 1245	*Break*
1245 – 1420	***Process & Delivery (cont'd)*** *Model Office & Rollout*
1420 - 1430	***Recap***
1430	*Lunch & End of Day Three*

Day 4:   **Thursday, 14th of August 2025**

0730 – 0930	***Implementation Planning*** *ISO 15489 Part 2 (Designing, Implementing & Administering Specialized Systems for Managing Records)*
0930 – 0945	*Break*
0945 – 1100	***Implementation Planning (cont'd)*** *ISO 15489 Part 2 (Integrating Records Management into Business Systems & Processes)*
1100 – 1230	***Implementation Planning (cont'd)*** *Information Audit: Monitoring Compliance*
1230 – 1245	*Break*
1245– 1420	***Implementation Planning (cont'd)*** *Project & Programme Planning*
1420 - 1430	***Recap***
1430	*Lunch & End of Day Four*

Day 5:   **Friday, 15th of August 2025**

0730 – 0915	*Case Studies*
0915 – 0930	*Break*
0930 – 1100	*Case Studies (cont'd)*
1100 – 12305	*Case Studies (cont'd)*
1230 – 1245	*Break*
1245 – 1345	*Case Studies (cont'd)*
1345 - 1400	*Course Conclusion*
1400 – 1415	*POST-TEST*
1415 – 1430	*Presentation of Course Certificates*
1430	*Lunch & End of Course*

Practical Sessions

This practical and highly-interactive course includes real-life case studies and exercises:-

Course Coordinator

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